



*at the Dalla Lana School of Public Health
University of Toronto*

**The Health Communication Unit
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Health Promotion 102

Workplace Health Promotion



Webinar Session 2 of 3

Diagnosing & Strategizing

Feb. 11, 2011

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Quick Recap re: Session 1



- Structure of HP 102 (5 parts to each module)
- Audience and Use
- Modules:
 - Introduction
 - Element One – Obtain Management & Labour Support
 - Element Two – Establish a Healthy Workplace Committee

Workplace Program Management



Internal Project Management

Components

- Participation
- Time
- Money / Resources
- Data-gathering
- Decision-making

Element 1	Element 2	Element 3	Element 4	Element 5	Element 6	Element 7	Element 8
Obtain Management and Labour Support	Establish Healthy Workplace Committee	Conduct Situational Assessment	Develop Healthy Workplace Plan	Develop Program & Evaluation Plan	Obtain Management and Labour Support	Implement Plan	Generate Evaluation Report
Components <ul style="list-style-type: none"> •Business Case 	Components <ul style="list-style-type: none"> •Strategic Recruitment •Terms of Reference •Leadership 	Components <ul style="list-style-type: none"> •Environmental Scan •Needs & Risk Assessment •Organizational Change Survey 	Components <ul style="list-style-type: none"> •Vision •Mission •Values •Goals •Strategies •Key Audiences •Sustainability 	Components <ul style="list-style-type: none"> •Objectives •Programs/ Activities <ul style="list-style-type: none"> ▪ awareness ▪ education & skill building ▪ supportive environments ▪ policies •Indicators •Evaluation •Methodology •Resources •Timeline •Responsibilities 	Components <ul style="list-style-type: none"> •Plans •Presentation •Evidence 	Components <ul style="list-style-type: none"> •Communication & Marketing •Capacity Building •Events •Interpersonal Activities •Monitoring •Conduct Evaluation <ul style="list-style-type: none"> ▪ process ▪ outcome ▪ impact ▪ economic 	Components <ul style="list-style-type: none"> •Key Result Areas •Indicators •Results •Implications •Recommendations



Implement Evaluation



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The Third Module Element Three – Conduct a Situational Assessment

What...

...does the term

'Prescription without Diagnosis is Malpractice'

...mean to you?

Conducting a Situational Assessment



Health Promotion 102

Workplace Health Promotion



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Introduction

The Foundation and Background of Workplace Health Promotion

Element One

Obtaining Management and Labour Support

Element Two

Element Three

Conduct a Situational Assessment

Learning Outcomes

By the end of this module, you will be able to:

- Explain what a healthy workplace situational assessment could include and how to decide what to include;
- Explain the six typical types of healthy workplace situational assessment tools;
- Describe the key considerations for success when conducting a situational assessment; and
- Identify sources of information and tools that can be used when conducting a situational assessment.

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Pre-Learning Reflection

- Already Know
- Must Know/Must Find Out
- Would be Nice to Know

Internal Consultant
vs.
Intermediary?

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Introduction

The Foundation and Background of Workplace Health Promotion

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Element Four

Develop Your Strategy

Element Five

Develop a Program and Evaluation Plan

Element Six

Obtain Management and Labour Support

Element Three

Conduct a Situational Assessment

Learning Content

The CWHP Planning Framework

Recall the eight elements of the Comprehensive Workplace Health Promotion (CWHP)

[Planning Framework:](#)

Element	Title
1	Obtaining Management and Labour Support
2	Establish a Healthy Workplace Committee
3	Conduct a Situational Assessment
4	Develop Healthy Workplace Plan
5	Develop Program and Evaluation Plan
6	Obtain Management and Labour Support
7	Implement Plan
8	Generate Evaluation Report

Once management, organized labour and any other key organizational players are in support of the concept of a healthy workplace strategy and a healthy workplace committee has been established, the next element is to conduct a healthy workplace situational assessment.

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- The CWHP Planning Framework
- Situational Assessment Basics
- Starting a Situational Assessment
- Identify Information Gaps
- Understanding the Types of Situational Assessment Tools
- Choosing a Situational Assessment Tool
- Tips for Successful Survey Implementation
- Beyond Surveys
- Summary

- What is a healthy workplace situational assessment (SA) ?
- Why conduct a SA?
- How does a SA influence planning?

E. Complete a PEEST analysis

Facilitate a meeting with key stakeholders and the healthy workplace committee to analyze the strengths and barriers to a healthy workplace strategy from the following five perspectives:

- **Political Factors:**
 - External politics, including health and safety laws, employment laws, environmental regulations, taxation and regulatory issues.
 - Internal politics, including restructuring, leadership changes, conflicting vision between leaders, layoffs and conflict between departments.
- **Environmental factors:**
 - For example, interest in sustainability and organizational corporate social responsibility mandate.
- **Economic factors:**
 - For example, financial stability of the organization, financial and human resources availability to support the strategy.
- **Social factors:**
 - For example, the degree of connectivity and friendships within the organization, demographics, attitudes toward safety, predominant discussions and thoughts regarding health and the career expectations.
- **Technological factors:**
 - For example, employee access to technology, rapid changes in technology within the organization and the level of automation in the organization.

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6 Typical Types of SA

- Current Practice Survey
- Health Risk Assessment
- Interest Survey
- Needs Assessment
- Organizational Culture Survey
- Workplace Audit

There are also a few key considerations and decisions to make before choosing a survey tool. Consider asking yourself the following questions:

Will we be surveying everyone or a few people?

- Audience = **all** employees or
- Audience = a **group** of representative employees. This is called a sample.

Note: It is not unusual for a workplace to undertake both of these approaches but it is important to know the scope of survey distribution before you start.

How much time do we expect respondents to take completing a survey?

- 5-10 minutes
- 10-30 minutes
- More than 30 minutes

Note: A shorter survey will usually yield more accurate results, as respondents are better able to stay focused. It will occasionally yield a higher return rate as well. Shorter surveys mean, however, you must have a very good idea of the information you require.

Will distribution, collection and analysis be done by an internal team or external partner?

If the appropriate skills are available, internal implementation is usually more cost efficient. However, when employees know the survey will be handled by an external partner, their confidence in the degree of confidentiality increases. This in turn increases the probability of honest responses.

Note: There are advantages and disadvantages to internal or external implementation. What is important is that deliberate consideration be given to the decision before the process and any communication to employees regarding the survey is initiated.

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Tips for Survey Implementation

Double check:

- Management supportive
- Policies re: sensitive issues
- Instructions, Ease, Time, Timing, Access
- Participation is voluntary
- Reading and/or literacy levels
- Meeting objectives
- Cost and time considered from various perspectives

More Tips

- Acknowledge all three categories of CWHP
- Decide on the report format B4
- Tell 2x B4
- Communicate full process B4
- Follow-up as committed
- Train the HW committee on their role

The Intermediary's Quandary

Advise on Tool? Advise on Vendor/Partner?

Coach Interpretation?

Collect Data?

Advise on Process? Advise on Customization?

- Provide one Tool?
- Provide various tools to choose from?
- Provide a customizable tool?

Who owns the data?

Interpret?

Facilitate focus groups?

Comprehensive Workplace Health Promotion

Catalogue of Situational Assessment Tools

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Complete Tool Listing

All interventions (alphabetical) by **Tool Name**

Tool Name	Organization	Rating
BWell Employee Interest Survey	Buffett and Company Worksite Wellness Inc.	 Recommended
CHEW - Checklist of Health Promotion Environments at Worksites	Collaboration between the University of Sydney and the University of San Diego	 Promising
Conditions of Work Effectiveness Questionnaire-II (CWEQ-II)	Laschinger Research, University of Western Ontario	 Promising
Connex Health Risk and Productivity Assessment (CHRPAC)	Connex Health Consulting	 Recommended
Emotional Wellness Self-Assessment	Entec Corporation	 Recommended
Emotional Wellness Survey - Corporate	Entec Corporation	 Recommended
Employee Engagement Survey (Level 1)	Entec Corporation	 Recommended
Employee Engagement Survey (Level 2)	Entec Corporation	 Recommended
Employee Engagement Survey (Level 3)	Entec Corporation	 Recommended
Employee Feedback System	Metrics@Work Inc.	

Organizational Culture: From Assessment to Action

Version 1.0 March 2009

The focus of this Info-pack is to assist the workplace health promotion intermediary with specific actions and ideas relevant to changes in workplace organizational culture. This includes tools to assess the organizational culture component of workplace health as well as possible actions to address changes in culture.

This Info-pack contains:

- An overview of three potential approaches that can be used to understand and assess organizational culture.
- Practical ideas and strategies to consider that can help change an organization's culture when necessary.
- Examples of good practice in organizational culture change.
- A list of available resources about organizational culture change.

INFO-PACK



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WORKPLACE MENTAL HEALTH PROMOTION

A HOW-TO GUIDE

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Element 3: Conducting a Situational Assessment – Getting to the Root of the Problem

[Introduction to Comprehensive Workplace Health Promotion](#)

[Element 1: Obtaining Management Support](#)

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The first major task of a healthy workplace committee is to conduct a situational assessment. This will help ensure an organization accurately identifies the main issues affecting the majority of employees. Without conducting a situational assessment the committee's program can be biased to the needs and preferences of the committee members. A situational assessment can also help to further strengthen the case for improved programming with senior management, ensure that company resources are put to best use and serve as a baseline measurement in program evaluation.

A situational assessment should start with a review of existing information, such as previous employee survey results, absenteeism reports, exit interview data and health benefit use data. Typically, data gaps are then filled by using focus groups, interviews, audits, assessments or surveys. Ideally, various types of data are gathered from multiple sources, not just from one assessment tool. It should use a combination of methods, such as face to face consultation, surveys and existing large data sets and by accessing existing sources of data, such as researchers, community organizations and government websites. There are many different ways to conduct situational assessments and there are many different types of assessment tools, such as current practice surveys, health risk assessments and needs assessments. Surveys typically are thought to be the easiest method to gather input from the largest number of people possible. Organizations using surveys should make sure that it is of a high quality, comprehensive and is asking the "right" questions.



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The Fifth Module Element Four Develop Your Strategy

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Element Six

Obtain Management and Labour Support

Element Four Develop Your Strategy

Learning Content

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[Planning Framework:](#)

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3	Conduct a Situational Assessment
4	Develop Healthy Workplace Plan ←
5	Develop Program and Evaluation Plan
6	Obtain Management and Labour Support
7	Implement Plan
8	Generate Evaluation Report

Once you've obtained support, established a committee and have completed the situational assessment, the next element is to develop an overall healthy workplace strategy. This element represents this strategic level of planning.

What is planning? Planning is a series of decisions - from strategic decisions, such as identifying priorities, to specific operational details, such as program implementation. Planning is based on the collection and analysis of a wide range of information.

In the CWHP model, there are two key planning elements. The information you have gained in the situational assessment will inform your decisions in both Element 4 and Element 5. However, it is important to distinguish the strategic level of planning that occurs within Element 4 from the program, operational and evaluation planning that occurs within Element 5.

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- The CWHP Planning Framework
- Levels of Planning
- Vision and Mission
- Clarify any Frameworks, Values or Guiding Principles
- Key Audiences

Learning Content

Vision and
Clarify any
Guiding P
Key Audie

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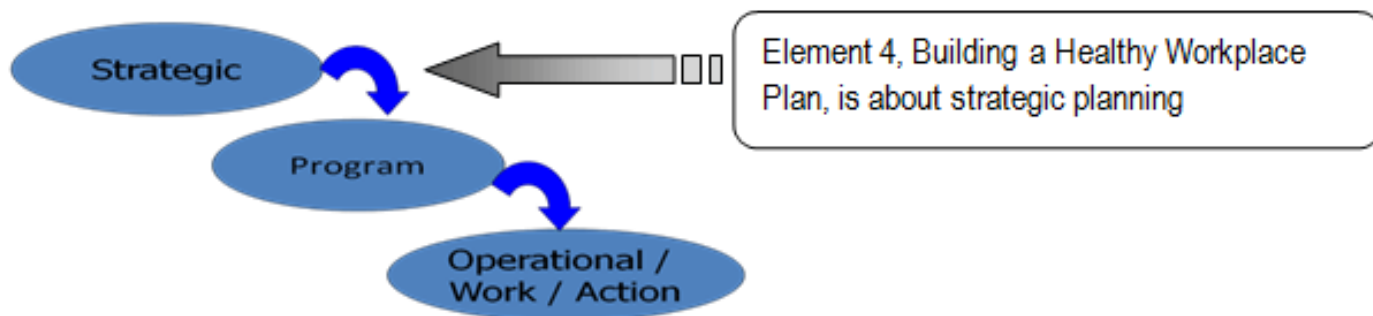
Element Five
Develop a Program and Evaluation
Plan

Element Six
Obtain Management and Labour
Support

Element Seven
Implement Plan

Element Eight
Generate Evaluation Report

Levels of Planning



Recall the eight elements of the Comprehensive Workplace Health Promotion (CWHP) [Planning Framework](#):

	Strategic	Program	Operational
Reason	Vision, mission, values, strategic direction, goals, key audiences, sustainability	Objectives, programs and activities, indicators, evaluation methods	Roles, responsibilities, resources, timelines for specific activities
Scope	Three to five year strategic plan	One year program plan	Day-to-day work plans
Key Stakeholders in Planning	Senior management, board, key decision-makers, labour, key internal and external partners	Management, employees	Delivery partners, healthy workplace committee, volunteers, employees
Data	Broad search	Audience analysis, best practices, evaluations	

- Describes a preferred future state;
- Is memorable and inspiring;
- Provides a realistic goal for the organization to try to achieve;
- Projects group values into the future;
- Serves to enrol and motivate others through its focus and appeal.

Vision Samples

Sample one:

- An organization that people want to work for because we are a supportive, energetic, healthy and successful organization.

Sample two:

- Employees are physically, mentally and emotionally well; they are engaged and productive and they feel they are working for a supportive organization that encourages them and their families to live healthy, balances lives.

But...

- Integrated vs. Separate?

Healthy Workplace Goal



- Same or different from vision?

Sample Goals

Sample one:

- To improve employee physical and mental well-being.

Sample two:

- To increase employee health, engagement and productivity.

Vision vs. Mission

- Desired future state

VS

- Statement of purpose
- Why something exists & how it is working to achieve the vision
- Often the same as the HW committee purpose statement

Sample Mission

Sample one:

- The organization is committed to being a healthy workplace. To that end, we have established a healthy workplace strategy and committee to help employees maintain physical and emotional well-being through relevant activities, information sharing and resources

Sample two:

- The healthy workplace strategy seeks to improve levels of employee engagement and reduce employee absenteeism by developing and implementing plans in response to our annual employee engagement survey

And...

Clarify any Frameworks, Values or Guiding Principles

- What frameworks might apply?
- What values?
- What guiding principles?

Sample Guiding Principles



- Decisions will be made with the understanding that an individual's health is influenced by many interconnected factors
- Our approach will be comprehensive, taking into account health and safety, lifestyle practices and organizational culture
- We will seek to be responsive to the needs of both the organization and employees
- We recognize that participation by employees at all levels is key to successfully creating a sustainable, healthy workplace

Key Audience

- When might it be narrower than 'all employees'?
- When might it be broader than 'all employees'?

Workplace Program Management



Internal Project Management

Components

- Participation
- Time
- Money / Resources
- Data-gathering
- Decision-making

Element 1	Element 2	Element 3	Element 4	Element 5	Element 6	Element 7	Element 8
<p>Obtain Management and Labour Support</p> <p>Components</p> <ul style="list-style-type: none"> •Business Case 	<p>Establish Healthy Workplace Committee</p> <p>Components</p> <ul style="list-style-type: none"> •Strategic Recruitment •Terms of Reference •Leadership 	<p>Conduct Situational Assessment</p> <p>Components</p> <ul style="list-style-type: none"> •Environmental Scan •Needs & Risk Assessment •Organizational Change Survey 	<p>Develop Healthy Workplace Plan</p> <p>Components</p> <ul style="list-style-type: none"> •Vision •Mission •Values •Goals •Strategies •Key Audiences •Sustainability 	<p>Develop Program & Evaluation Plan</p> <p>Components</p> <ul style="list-style-type: none"> •Objectives •Programs/ Activities <ul style="list-style-type: none"> ▪ awareness ▪ education & skill building ▪ supportive environments ▪ policies •Indicators •Evaluation •Methodology •Resources •Timeline •Responsibilities 	<p>Obtain Management and Labour Support</p> <p>Components</p> <ul style="list-style-type: none"> •Plans •Presentation •Evidence 	<p>Implement Plan</p> <p>Components</p> <ul style="list-style-type: none"> •Communication & Marketing •Capacity Building •Events •Interpersonal Activities •Monitoring •Conduct Evaluation <ul style="list-style-type: none"> ▪ process ▪ outcome ▪ impact ▪ economic 	<p>Generate Evaluation Report</p> <p>Components</p> <ul style="list-style-type: none"> •Key Result Areas •Indicators •Results •Implications •Recommendations



Implement Evaluation

Next Sessions

Session Three:

- Friday March 4th – 9:30-11:30

Wrap-up

- Thank you for your participation!
- Please contact us with questions or consultation requests hc.unit@utoronto.ca
- We will send you a link to evaluate this webinar; please complete the evaluation!



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Know what's weird?

**Day by day, nothing
seems to change. But
pretty soon, everything's
different.**

~Calvin (Calvin & Hobbes)